MEET YOUR ICMA-RC RETIREMENT PLANS SPECIALIST!

Your salaried (non-commission based) ICMA-RC Retirement Plans Specialist is motivated every day to help people succeed in building a path to financial wellness. Your Retirement Plans Specialist is responsible for providing on-site services, including participant enrollment, investment education, retirement readiness education, and individual educational meetings to public employee retirement plans.

Brad Smith
E-mail: jbsmith@icmarc.org

To help serve you better and for fastest service, below is a contact guide:

CONTACT YOUR RETIREMENT PLANS SPECIALIST

Contact your Retirement Plans Specialist if you need assistance with:

- Enrollment questions
- Rollovers into your ICMA-RC account
- Investment strategy, account management, and how much to save
- Pre-retirement checkup

LOG IN TO YOUR ACCOUNT

Log in to your ICMA-RC account at www.icmarc.org/login or contact ICMA-RC Investor Services at (800) 669-7400, if you need assistance with:

- Account log in or website resources
- Change or verify your 457 or Roth IRA contribution amount *(Roth IRA contributions can only be changed on the website and not over the phone)*
- Investment changes *(allocations and transfers between funds)*
- Withdrawals or distributions
- Forms and brochure requests
- Balance and quarterly statement inquiries
- Account maintenance and transactions
- Address, name, and beneficiary changes
- All other questions

Download the ICMA-RC Mobile App from Google Play or the App Store Today

GET IT ON Google Play

Download on the App Store

Visit the Retirement Edcuation Center at www.icmarc.org/education for tips and tools to save, invest and realize retirement.

ICMA-RC
BUILDING PUBLIC SECTOR RETIREMENT SECURITY

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